


**MSBO Voluntary
Certification Program
Survival Training for Business
Managers**


Presented by:
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Michigan School Business Officials

September 21, 2011




MSBO Certification

- Voluntary Program
- Practical information
- Advances professionalism
- Base of knowledge



Twelve Certification Programs

- Chief Financial Officer (CFO)
- Business Office Manager (BOM)
- Business Office Specialist (BOS)
- Pupil Accounting Auditor (PAA)
- Pupil Accounting Specialist (PAS)
- School Payroll Specialist (SPS)



Twelve Certification Programs



- Certified Operations Director (COD)
- Facilities Director (CFD)
- Transportation Director (CTD)
- Child Nutrition Director (CND)
- School Technology Management (STM)
- Human Resource Specialist (HRS)

Qualifications



- Current MSBO member
- Aspiring school business official
- Employed by a Michigan School District
- Bachelor's Degree, Associate's Degree or none depending on certification track
- CFO, BOM & SPS require accounting hours

Start the Program



- Fill out a Letter of Commitment
- Complete required classes
- Three years to complete

Years of Experience



- Grand parenting in any track except for (CFO)
- Must meet pre-requisites

Years of Experience



- Grand parenting (cont)
- 6-10 years of school experience
 - 18 hours and the wrap-up session
 - 11-14 years of school experience
 - 12 hours and the wrap-up session
 - Over 15 years of school experience
 - 6 hours and the wrap-up session

Certification Class Offerings



- Classes are offered through MSBO – www.msbo.org
- Classes are offered through MIEM – www.gomiem.org
- Other partnering organizations
- A certification class booklet can be found at www.msbo.org

Receive Certificate



- Complete all requirements
- Final application

Maintaining Certification



- Continuing education requirements job-related education
 - 180 hours for CFO or 18 SB-CEUs or six semester college credits
 - 90 hours for all other tracks or 9 SB-CEUs or three semester college credits
 - For the CFO and the BOM certification programs, 13 of the hours must come from the Group Solutions Seminar

Maintaining Certification



- NEW this year is the MSBO Leadership Institute
 - All certification tracks
 - Year-long program
 - One-on-one coaching
 - Online instruction
 - Four face-to-face meetings
 - Starts in October 2011 – July 2012

Renew Certification



- Renewal application
- MSBO membership must be current
- New certificate is issued

Thank You!



- For more information –
www.msbo.org/certification/index.shtml
- Contact Debbie Kopkau
- dkopkau@msbo.org
- 517.327.2587

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Overview of Facilities / Transportation/Food Services Operations

Scott Little
Associate Executive Director, MSBO
September 21, 2010

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These Operations are all essential to a well run school district

- ☑ Each function requires a professional manager to be successful
 - ☑ Well trained and current
 - ☑ Possess communication skills
 - ☑ Ability to analyze operation

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Common Components

- Compliance
- Training
- Data
- Communication
 - Internal and External
- Safety

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MSBO

- ▶ Networking
 - ▶ Committees
 - ▶ Facilities
 - ▶ Transportation
 - ▶ Food Service
- ▶ Training
 - ▶ Custodial Certificate Program
- ▶ Certification
 - ▶ Facilities Directors Conference, Oct 3 – 5
 - ▶ Bus Purchase Program

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Consulting Services

- Energy
 - Energy Essentials
- Facilities
- Transportation
- Food Service

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Thank you

For more information regarding these areas
and how MSBO can assist you,
contact

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***Who are Business Officials and
What do They do?***

Robert K. Dwan, CFO
Associate Executive Director,
MSBO
September 21, 2011

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Overview

- I. What is a Business Official?
- II. What Do They Do?
- III. Contending with the Pressures
- IV. Personal Attributes to Help
Ensure Success

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***What is a
Business Official?***

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I. What is a Business Official?

- ⊗ **Chief Financial Officer**
 - ⊗ Finance, Budgeting, Accounting
- ⊗ **Chief Operations Officer**
 - ⊗ Buildings and Grounds, Transportation, Food Service
- ⊗ **Chief Financial and Operations Officer**
 - ⊗ All the above
- ⊗ **Chief Financial, Operations, and Human Resources Officer**
 - ⊗ All the above plus Personnel, Negotiations

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I. What is a Business Official?

- ⊗ **Combination of all of the above, with exceptions.**
 - ⊗ Each district can be different
 - ⊗ Duties get adjusted based on needs and skills

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What Do They Do?

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II. What Do They Do?

- ⊗ Responsible for everything from finances and budgeting, to personnel and operations
- ⊗ Perform detailed analytical studies
- ⊗ Create long-range plans and projections

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II. What Do They Do?

- ⊗ Function in both a detail-oriented and a people-oriented environment
- ⊗ Handle multiple pressures and deadlines
- ⊗ Know their place in the organization

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II. What Do They Do?

- ⊗ Help lead the organization under the supervision of the superintendent
- ⊗ Provide support to all areas of the district, including support organizations

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II. What Do They Do?

Examples of areas of responsibility:

- Supervision of Business Office employees
- Payroll operations
- Accounts Payable operations
- Budgeting
- Long term financial planning

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II. What Do They Do?

Examples of areas of responsibility:

- Develop a system of budget controls
- Cash flow analysis
- Investing of district funds
- Cash flow borrowings
- Prepare tax levies
- Debt service payments for bond issues¹¹

II. What Do They Do?

Examples of areas of responsibility:

- Employee negotiations and support
- Purchasing operations
- Financial reporting
 - Board of Education
 - State of Michigan
 - Federal programs
 - and more

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II. What Do They Do?

Examples of areas of responsibility:

- Risk Management and employee benefits
 - Health, Dental, & Vision Insurance
 - Workers Compensation Insurance
 - Unemployment
 - Tax Sheltered plans
 - Property/Casualty Insurance
 - School Board Liability Insurance
 - Fleet Insurance

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II. What Do They Do?

Examples of areas of responsibility:

- Data processing operations for the Business Office
- Facilitate the audit of the district
- Bond Issues
 - Budget Oversight
 - Manage bond proceeds
 - Prepare Official Statement
 - Continuing Disclosure
- Pupil Accounting

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II. What Do They Do?

Examples of areas of responsibility:

- Food Service operations
- Personnel
- Custodial operations
- Maintenance operations
- Transportation operations
- Grounds operations

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Contending with the Pressures

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III. Contending with the Pressures

- ⊗ Not enough time to complete everything the way you want to
- ⊗ Be careful how you cut corners
- ⊗ Delegate to challenged employees
- ⊗ Train challenged employees while performing your function
- ⊗ Develop trust with district employees in everything you do

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III. Contending with the Pressures

- ⊗ Always do the right thing
- ⊗ Be diplomatic - Implement the detailed financial and operational plans without overtly saying no
- ⊗ Never let stress get the best of you

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III. Contending with the Pressures

- It helps when you smile
- Sometimes your role is to be the “bad guy” though
- Continually work with less and provide more

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III. Contending with the Pressures

- Continually work with staff and constituents who just want what they want and don't care what comes into play... like:
 - laws
 - policies
 - procedures
 - ethics

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***Personal
Attributes to Help
Ensure Success***

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IV. Personal Attributes to Help Ensure Success

- Ability to function with multiple deadlines
- Humorous approach to challenges
- Strong accounting skills
- Strong analytical skills
- Detail oriented
- Quick learner

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IV. Personal Attributes to Help Ensure Success

- Divergent thinker and worker (i.e., not a linear thinker and worker)
- High energy person over extended periods of time
- Ability to organize and plan
- Passion for life outside of work
- Strong support structure outside of work

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IV. Personal Attributes to Help Ensure Success

- Ability to handle detours and still see and accomplish the big picture
- Ability to walk away when ethics will be compromised
- With more and more unethical situations reported in the news, we should see more and more support from the top
- Help your Superintendent & Administrators understand that part of your job is to keep them out of trouble



IV. Personal Attributes to Help Ensure Success



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